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# FAS REPORT

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Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

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WR 8-82

WASHINGTON, Feb. 24--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following recent developments in world agriculture and trade:

## GRAIN AND FEED

SOUTH AFRICA's corn production could be down one-third from the record 1981 harvest of 14.2 million tons and its sorghum production down one-fifth from last year's 557,000 tons, according to the agricultural counselor in Pretoria. Based on a recent field trip, the counselor reports that rainfall over the main corn and sorghum producing areas of South Africa has been erratic, spotty, and poorly timed. Wide variations in crop maturity and conditions are noticeable. It also appears that less area was shifted into sorghum than previously estimated.

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In northern INDIA's major winter grain producing states, favorable weather since seeding time has been beneficial for the 1982 wheat crop. Sown area is believed to have changed little from last year's 22.1 million hectares. However, adequate supplies of fertilizer and greater use of higher yielding varieties could boost India's 1982 wheat outturn. India's 1981 wheat harvest totaled a record 36.5 million tons.

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GREECE's 1981 corn crop is estimated at 1.36 million tons, the third consecutive record harvest, according to the U.S. agricultural counselor. These records are due primarily to the adoption of new hybrid seed varieties that have greatly improved yields. This year's record yield, at 8.45 tons per hectare, is 13 percent higher than last year's 7.5 tons.

## DAIRY, LIVESTOCK AND POULTRY

In ROMANIA, end-of-year livestock inventories indicate short feed supplies are having a significant impact on the livestock sector. According to official Romanian estimates, cattle and hog inventories are each down by about 2 percent, compared with January 1981, while sheep numbers have dropped roughly 4 percent. For cattle and sheep, this represents the largest inventory decline in more than 10 years, and resulted in above normal slaughter and a significant increase in industrial meat output. Data for the poultry and dairy sectors were not given.

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LYNN KRAWCZYK, Editor, Tel. (202) 382-9442. Additional copies may be obtained from FAS Information Services Staff, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.

The SOVIET UNION's January 1982 meat production in the socialized sector (state and collective farms) dropped to only 93 percent of the January 1981 level, with meat procurements showing a similar decline. This development reverses the pattern maintained through 1981 when monthly production and procurements were above year-earlier levels.

In the socialized sector, January 1982 beef production was down 8 percent, pork production was off by 9 percent, and milk production dropped 4 percent below levels a year ago. Average slaughter weights for cattle and hogs were each about 2 percent below January 1981. Production of poultry meat, eggs, and sheep meat were up 7 percent, 2 percent, and 4 percent, respectively, from January 1981 levels.

Livestock inventories in the socialized sector have continued at near-record levels. As of Feb. 1, cattle inventories on state and collective farms were reported at 90.1 million head, up 700,000 from 1981; hog inventories were down 600,000 head, while sheep and goats showed a small increase. Although poultry numbers were up by 27 million birds, the increase was considerably smaller than gains in recent years.

Data on private sector production were not given; however, meat and milk procurements were considerably below January 1981. Private sector meat procurements were off 17 percent, while January milk procurements were nearly 40 percent below the January 1981 level.

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The EUROPEAN COMMUNITY Commission lowered export subsidies on most cheeses shipped to the United States effective Feb. 12. Commission officials attributed this reduction to changes in world market prices and currency fluctuations. The subsidy was lowered from 22 to 18 cents per pound on Swiss cheese, from 12 to 9 cents on blue cheese, from 21 to 17 on cheddar, and from 20 to 16 cents per pound on Colby and Monterrey cheeses.

The Commission also lowered the supplementary import levy on poultry legs (other than geese or turkeys) originating in the United States and Spain from 16 cents to 7 cents per pound, effective Feb. 12.

#### TOBACCO

The EUROPEAN COMMUNITY's Generalized System of Preferences (GSP) duty on three tobacco products was not changed as reported Feb. 11. The reduction of these GSP duties was proposed but rejected by the Commission. GSP duty rates remain: Cigarettes, 87 percent; cigars, 42 percent; smoking tobacco, 110 percent; chewing tobacco and snuff, 45 percent; and other, 19 percent.

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COLOMBIA's 1981 unmanufactured tobacco exports are estimated at 16,000 tons, down 23.8 percent from that of a year earlier, primarily because of low black tobacco exports, which declined to 13,500 tons from 19,700 tons in 1980. Spain is Colombia's top market for black tobacco, purchasing one-third of Colombia's exports. The United States buys some of the black tobacco, as well as the light leaf (burley) tobacco, averaging about 1,500 tons during the past 3 years. For 1982, total exports are forecast at 14,000 tons--12,000 tons black and 2,000 tons of burley.

Tobacco imports (flue-cured) are estimated at 400 tons in 1981, against 300 tons the previous year, largely from Argentina and Brazil. No tobacco has been imported from the United States since 1979, when a total of 105 tons was purchased. The 1982 tobacco imports are forecast at 470 tons. Colombia also imports substantial quantities of cigarettes, nearly all from the United States. In 1981, U.S. exports of cigarettes to Colombia amounted to 1.5 billion pieces, valued at \$18.7 million, compared with 2.4 billion pieces, valued at \$27.0 million in 1980.

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AUSTRALIA's Tobacco Board's recommendation that the minimum average price for marketing quota tobacco leaf offered during the 1982 selling season be set at A\$ 4.4472 (U.S. \$5.10) per kilogram was accepted by the Australian Agricultural Council in early February. The new minimum average price represents an increase of 15 Australian cents (17.2 U.S. cents) per kilogram or a rise of 13.5 percent over 1981.

The Australian Agricultural Council had already accepted a recommendation from the Board at its mid-year 1981 meeting that the marketing quota for the 1982 season be set at 15 million kilograms of flue-cured leaf. However, it is expected that the actual volume of leaf to be offered this year will not exceed 14.8 million kilograms. In comparison, the marketing quota for the 1981 crop was originally set at 14.9 million kilograms, but scaled down to 14.7 million kilograms to reduce excess stocks held by the manufacturers, with actual quantity of leaf offered at sales amounting to only 14.4 million kilograms.

The Industries Advisory Commission will hold hearings starting in March prior to making recommendations with regard to the Australian tobacco stabilization plan for the next five years (1983-88). In recent years, Australian tobacco consumption has not kept pace with production, resulting in surplus stocks and sales below production quotas.

#### HORTICULTURAL AND TROPICAL PRODUCTS

The INTERNATIONAL ORGANIZATION FOR SUGARCANE RESEARCH AND DEVELOPMENT is currently being formed, and will be located in Panama. Representatives of the Group of Sugar Exporting Countries of Latin America and the Caribbean, the Panamanian Institute for Agricultural Research, the Government of Panama's La Victoria Sugar Corporation, and sugar experts from Brazil, Colombia, Mexico, the Dominican Republic, and Cuba recently reached agreement to set up the organization.

In March, representatives for the respective parties will meet in Panama to discuss securing financing for the proposed organization, which will disseminate the latest sugarcane technology among members of the organization, provide a training institution for technicians, and upgrade the sugar industry in member countries. Most likely, research will focus on plant diseases, development of improved varieties, planting densities, and utilizing sugarcane for gasohol.

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Guatemala has been relatively successful thus far in finding coffee markets in countries that are not members of the International Coffee Organization (ICO). During October-November 1981, 19 percent of the 359,420 bags of coffee (green equivalent) exported went to non-member countries. If that rate continues, Guatemala could look forward to total sales of 2.2 million bags in coffee year 1981/82 (October-September), including one-third million bags to non-ICO members.

While non-member sales have helped move additional Guatemalan coffee, they have had to be heavily discounted. October-November sales to ICO member countries returned an average of \$159.27 per bag (\$1.20/lb.), while returns from sales to non-ICO countries averaged only \$101.88 per bag (\$0.77/lb.). Coffee for sale to non-members is purchased from farmers producing more than their assigned quotas. Growers have asked the government to eliminate the export tax on coffee destined for non-ICO countries, as was done for the 1980/81 crop.

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BRAZIL is expected to export roughly 17.2 million bags of coffee during the 1981/82 (July-June) marketing year, including about 14.7 million bags to importing members of the International Coffee Organization (ICO) and 2.5 million bags to non-members. Excluding early purchases from the 1982/83 harvest, this would leave year-end stocks on June 30, 1982, at 13.5 million bags, 7.3 million bags above the level at the end of 1980/81.

The Brazilian Coffee Institute's (IBC) carryover stocks at the end of 1981/82 should total about 7.5 million bags, with the balance held by the private sector. The IBC has not purchased any coffee since the passage of IBC resolution No. 60, effective Dec. 14, 1981, which encouraged grower cooperatives and exporters to hold their surplus coffee, rather than sell it to the IBC. By holding the additional stocks, grower cooperatives and exporters could qualify for additional monthly green coffee export quotas to importing members of the ICO proportional to their respective inventories.

#### RECENT FOREIGN AGRICULTURE CIRCULARS AND PUBLICATIONS

The U.S. Agricultural Trade Book, FAS M-307

The Current USSR Grain Situation, FG 2-82

Export Markets for US Grain and Feed Commodities, FG 3-82

The Current USSR Grain Situation, FG 4-82

Southern Hemisphere Crop Developments Leave World Estimates Little Changed, WCP 2-82

World Exports and Imports of Oilseeds, Oils, and Meals, 1978-80, FOP 2-82

Northern Hemisphere Citrus Situation, FCF 1-82

U.S. Raw Hop Exports Up in 1980/81; Extract Lower After Record of 1979/80, FH 1-82

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World Tobacco Situation, FT 1-82  
World Tobacco Situation, FT 2-82  
World Cotton Situation, FC 2-82  
U.S. Seed Exports for the Marketing Year Through November and  
Comparisons with Previous Year, FFVS 1-82  
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Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Feb. 23, 1981	Change from		A year ago	
		previous week			
		:			
		\$ per m. ton	\$ per bu.	¢ per bu.	
Wheat					
Canadian No. 1 CWRS-13.5%.....	1/	1/	1/	1/	
U.S. No. 2 DNS/NS: 14%.....	184.00 7/	5.01 7/	-1 7/	221.50	
U.S. No. 2 DHW/HW: 13.5%.....	199.00	5.42	+13	223.00	
U.S. No. 2 S.R.W.....	166.00	4.52	-1	213.00	
U.S. No. 3 H.A.D.....	187.50 7/	5.10 7/	-4 7/	262.00	
Canadian No. 1 A: Durum.....	209.00 7/	5.69 7/	-8 7/	1/	
Feed grains:					
U.S. No. 3 Yellow Corn.....	124.00	3.15	-5	167.00	
U.S. No. 2 Sorghum 2/.....	145.00	3.68	0	184.00	
Feed Barley 3/.....	1/	1/	1/	197.00	
Soybeans:					
U.S. No. 2 Yellow.....	248.00	6.75	-8	310.50	
Argentine 4/.....	247.50 7/	6.74 7/	-9 7/	320.50	
U.S. 44% Soybean Meal (M.T.)..	232.00	--	-2.00 5/	272.60	
EC Import Levies					
Wheat 6/.....	86.65	2.36	-3	63.05	
Barley.....	65.40	1.42	-3	32.30	
Corn.....	96.60	2.45	+1	71.80	
Sorghum.....	77.80	1.98	-2	58.05	

1/ Not available.

2/ Optional delivery: U.S. or Argentine Granifero Sorghum.

3/ Optional delivery: Canadian Feed Barley.

4/ Optional delivery: Brazil yellow.

5/ Dollars per metric ton.

6/ Durum has a special levy.

7/ April/May delivery

Note: Basis March delivery.



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